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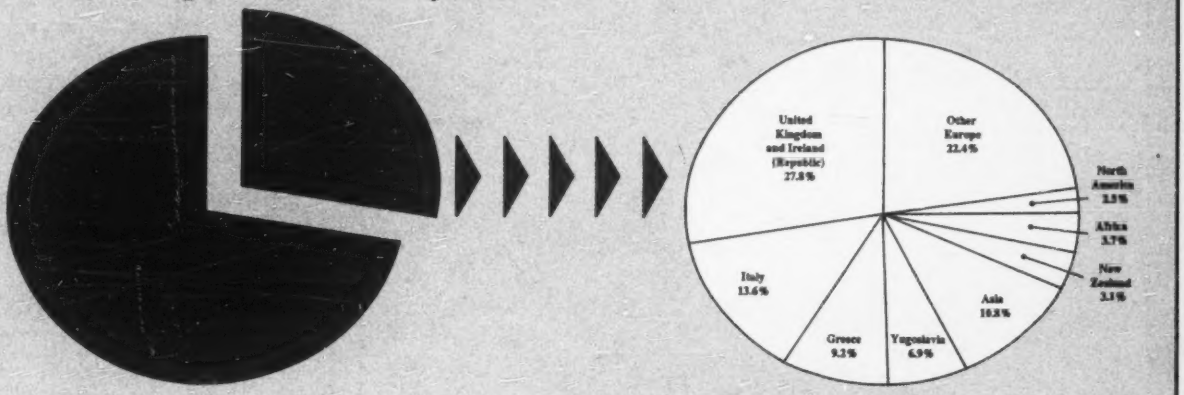
INTERNATIONAL DEMOGRAPHICS

CONSUMER ■ TRENDS ■ AND ■ MARKETS ■ ABROAD

MARCH 1986 VOLUME 5, NUMBER 3

Melbourne's immigrants: Where they come from



AREA PROFILE

Greater Melbourne

Pubs, rugby matches, Yorkshire pudding, cockney idioms--Melbourne has them all. But with more than one-fourth of its residents born overseas, it is rapidly changing from an all-white outpost of Britain to a multicultural, multilingual community rivaling any of the world's immigrant cities.

What transformed Melbourne was Australia's abandonment of its "white Australia policy" after World War II. In the last 25 years, 3 million immigrants from 100 different countries have come to Australia, the majority settling in Melbourne and Sydney. The bulk of Melbourne's newcomers hail from New Zealand, Rhodesia, South Africa, Britain, Ireland, Greece, Turkey, Italy, Yugoslavia, Poland, and Indochina.

In recent years, Melbourne's polyglot, multicultural flavor has been encouraged by Australia's official attitude of integrating rather than assimilating immigrants. Immigrant groups are encouraged to maintain their languages and cultures while becoming part of Australia. Melbourne's 40 Greek Orthodox churches, 3 mosques, and streets lined with Vietnamese and Chinese restaurants hint at how well Melbourne has contributed to the new Australian ethos of tolerance for, and pride in, ethnic diversity.

Melbourne is Australia's second largest city and is in constant competition with Sydney for cultural, economic, and political dominance of the nation. Built on the shores of Port Phillip Bay, the city enjoys a mild but changeable climate which helps shape a lifestyle oriented to gardening, sport, and outdoor activity.

One out of five Australians calls Melbourne home. Located in the State of Victoria, Melbourne had a

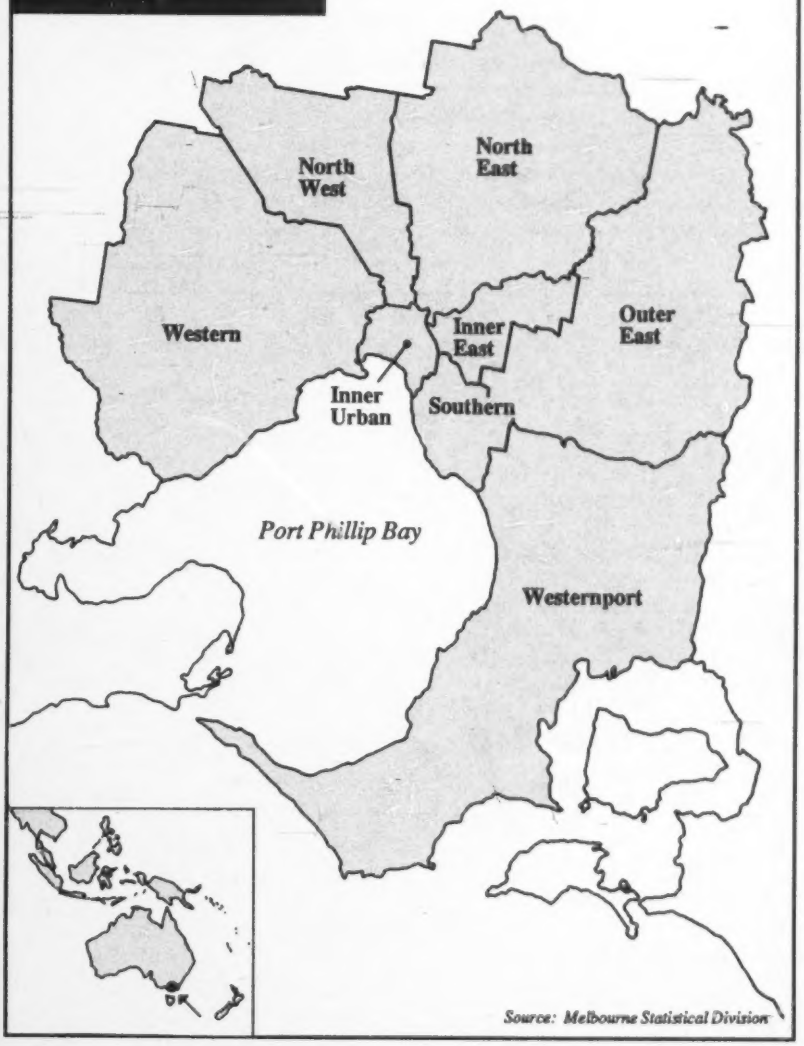
continued

INSIDE

Contraception in Britain.....7
Australia's APASCO offers mapping for site and customer location.....8
Regions: Brazil, Kenya, Turkey, Canada, China.....10

THIS MONTH: MELBOURNE

GREATER MELBOURNE



Source: Melbourne Statistical Division

population of 2,888,400 in 1984. It was first occupied by British colonists in the 1830s, and in the 19th century was one of the world's most rapidly growing cities, expanding from a population of 300 in 1837 to 535,000 in 1900. Growth in the 20th century has been more subdued, although one particular component of Melbourne's growth--overseas migration--remains dominant to this day.

One of the characteristics of 19th-century Melbourne that continued unchanged until recently was the process of extending and filling in the metropolitan area by uncontrolled speculative subdivision. The subdivision process, reinforced by households' preference for detached dwellings--75 percent of Melbourne's population currently lives in detached houses--has created a sprawling, low-density city that rivals or exceeds the physical area of cities with two or three times its population. In the last few years, however, the Victorian government has made a concerted effort to control Melbourne's sprawl. Future growth is to be channelled into corridors or concentrated in and around designated district centers within the existing urban area.

The State of Victoria's only urban center of more than 1 million people, Melbourne accounted for nearly 72 percent of Victoria's population in 1984 with an average population density of 150 persons per square kilometer. The next largest urban area, Geelong, has a population of just over 100,000 and accounts for only 3.3 percent of Victoria's population.

POPULATION GROWTH

From World War II until the early 1970s, economic conditions improved greatly and population growth for both Australia and Melbourne accelerated substantially. Over this period, Melbourne's growth paralleled that of many American cities. In the "new" Melbourne, population doubled and suburbanization continued unchecked, facilitated by the increased use of the private motor vehicle. As a result, by 1981, 55 percent of the population lived in the outer suburban regions of Melbourne, compared with only 12 percent in 1947. Conversely, the inner-city population fell from 28 percent to just 9 percent of the total.

Between 1954 and 1961, the population of Melbourne grew at an average annual rate of 3.5 percent, fueled largely by an energetic overseas immigration program. Growth slowed somewhat from 1961 to 1971 but still averaged 2.5 percent annually. These two periods saw one

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of the greatest expansions of Melbourne since the 1880s.

From 1971, however, Melbourne's population growth slowed substantially as the combined result of lowered fertility, reduced immigration, outward internal migration, and a contraction in economic growth. Between 1971 and 1976, the annual growth rate averaged 1.4 percent, dropping to only 0.6 percent for the 1971-76 interval--the lowest rate since the 1890s depression and the lowest of any large Australian urban area.

Since 1966, both Sydney and Melbourne have lost population to the rest of Australia through internal migration. However, population in the two cities has continued to climb due to their popularity as destinations for a majority of Australia's immigrants. Between 1976 and 1981, nearly 95 percent of Melbourne's growth came from immigration. Moreover, rural areas around the capital cities absorb much of the internal migration.

ADMINISTRATIVE STRUCTURE

Metropolitan Melbourne has no government of its own. Instead it has 56 councils with populations ranging from 8,600 people to more than 120,000 people. Given the fragmented local government structure, planning and service provision for Melbourne is coordinated by a number of statutory authorities with few important urban functions left to local government. Strategic planning, education, health and welfare, housing, utilities, police, fire, and ambulance services are all provided at the state rather than municipal level. Local government takes care of waste disposal, road maintenance, and parks and gardens. The state employs 170,000 in Melbourne while local government employs only about 19,000.

To facilitate planning and services, the Melbourne metropolitan area is divided into eight regions, with a number of services including education, health, and some welfare and housing provided on a regional basis.

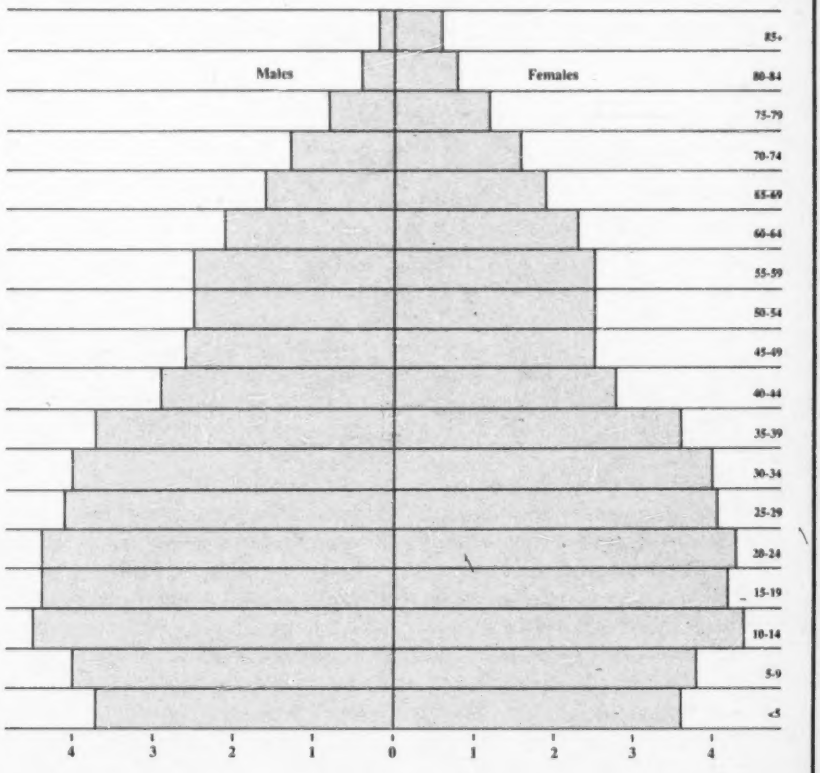
The largest region is the Western, with about 400,000 people. The smallest is the North West, with about 220,000 people.

As in all large cities, economic and demographic characteristics and lifestyle amenities vary from region to region. First, although having suffered population loss, the Inner Urban area has not decayed but rather offers a thriving and diverse environment for newly arrived migrants, working-class households, and professional (often childless) households.

Second, while some regions are

Population of the State of Victoria by age and sex: 1983 *(in percent)*

Melbourne is home to about 72 percent of Victoria's population



Age Group	*Total*	*Male*	*Female*
0-4	294,200	150,207	143,993
5-9	310,891	159,512	151,379
10-14	360,514	183,483	177,031
15-19	345,648	176,996	168,652
20-24	352,675	177,886	174,789
25-29	330,023	165,484	164,539
30-34	321,549	161,036	160,513
35-39	295,596	149,174	146,422
40-44	232,907	119,021	113,886
45-49	202,705	102,969	99,736
50-54	201,619	102,615	99,004
55-59	201,959	101,341	100,618
60-64	174,078	83,043	91,035
65-69	141,229	64,844	76,385
70-74	115,618	50,485	65,133
75-79	77,743	30,995	46,748
80-84	45,694	15,597	30,097
85 and over	29,984	7,659	22,325
All ages	4,034,632	2,002,347	2,032,285

Melbourne's regions, selected indices

Region	Population 1981	% Married couples with children 1981	% Overseas born 1981	% Males' income greater than $26,000 1981	% Tertiary qualified 1981	% unemployed persons 1981	% Owner occupiers 1981
Inner East	406,772	37.9	21.5	9.7	15.4	3.5	78.0
Inner Urban	245,019	17.3	32.8	5.1	12.9	8.4	36.8
North East	351,319	41.0	25.2	2.9	7.2	5.4	73.6
North West	228,737	40.1	31.8	1.5	4.6	6.3	71.3
Outer East	372,366	45.7	21.6	3.8	8.8	4.5	83.5
Southern	359,296	27.3	25.7	5.9	11.2	4.3	69.8
Western	407,447	42.4	31.9	1.6	4.7	6.5	73.0
Westernport	406,447	41.8	25.1	2.6	5.5	5.6	75.9

Resident population growth in Victoria: 1978-1983

Year	Rate of Natural Increase	Total Number of People	Rate of Net Overseas Migration	Total Number of People Net	Rate of Interstate Migration	Total Number of People Net	Rate of Migration Gain	Total Number of People	Rate of Total Population Growth
1978	0.78	30,021	0.47	18,068	−0.29	−11,000	0.18	7,068	0.69
1979	0.74	28,483	0.41	15,874	−0.28	−11,000	0.13	4,874	0.59
1980	0.74	28,843	0.54	20,932	−0.28	−11,000	0.26	9,932	0.72
1981	0.74	28,960	0.74	29,052	−0.39	−15,398	0.35	13,654	0.83
1982	0.77	30,346	0.79	31,374	−0.37	−14,515	0.43	16,859	1.20
1983	0.73	29,334	0.43	17,107	−0.15	−5,931	0.28	11,176	1.02

*Discrepancies between the sum of natural increase, net migration rates, and the rates of total growth are due to intercensal adjustment.

dominated by working-class households and have inferior amenities and services, and others are dominated by white-collar households with better amenities and services, the degree of class segregation is not as marked as in many other world cities.

In broad terms, however, the Inner East region is the most affluent and best serviced and the Western and Inner Urban regions, the least affluent, although the latter has a wide range of amenities and services.

IMMIGRATION AND ETHNICITY

A vigorous immigration program in the postwar years helped transform Melbourne from a predominantly Anglo-Saxon community to a truly international city reflecting the presence and contribution of its many overseas-born residents.

According to the 1981 census, 28 percent of the Melbourne population was born overseas. When first and second generation Australians are included, less than half the total population of Melbourne was born in Australia of Australian-born parents. Immigrants not only contribute to the labor force, but they bring to Melbourne a diversity of lifestyles and culture, foods and leisure activities.

Of the overseas-born in Melbourne, the largest group are from the United Kingdom and Ireland (27.8 percent), reflecting the traditional ties with the British Commonwealth. From non-English speaking countries, the largest single national group is the Italians, accounting for 13.6 percent of Melbourne's overseas-born population; the city hosts nearly twice as many Italians as Sydney. Firms catering primarily to the Italian community abound: builders, funeral parlors, law firms, supermarkets, clothing stores, and the ubiquitous Italian restaurant.

Melbourne's second largest non-English speaking immigrant group is the Greek community. About 69,000 Melbourne residents were born in Greece. In fact, Melbourne is the third largest Greek city in the world (counting only those people born in Greece), surpassed only by the Grecian cities of Athens and Thessalonika.

The third largest non-English speaking group are the Yugoslavs (51,000). Other important ethnic groups include the Lebanese, Turks, Dutch, and Germans.

In recent years, there has been a marked increase in immigration from Southeast Asia, reflecting the response of the Australian government to the plight of refugees fleeing Vietnam and Kampuchea. By establishing an immigration category for refugees, the Australian government has placed humanitarian aims on equal footing with other immigration criteria such as family reunion and labor market contributions.

Each immigrant group develops its own neighborhoods, although overall segregation of new immigrants is low by international standards. Historically, the first stop for immigrants has been the Inner Urban region, or one of the migrant hostels in the Inner East, Western, and Westernport regions. While the hostel accommodation is only temporary, immigrants tend to find employment and housing in suburbs around the migrant hostels. This trend facilitates the dispersal of immigrant communities throughout Melbourne's regions. Italian and Greek communities are disproportionately located in the Inner Urban, Western, and North West regions; British, Irish, German, and Dutch in the Westernport and Outer East regions; and Indochinese in the Inner East, Outer East, and Westernport regions.

In contrast to the North American experience, ethnic immigration has not led to the decline of the inner-city area but rather to its health.

FERTILITY

Compared to the rest of the developed world, Australia's and Melbourne's current level of fertility is high, reflecting its younger age structure than that characteristic of countries such as Japan, Canada, and the

United States. Fertility is, however, on the decline. The total fertility rate (the total number of children an average woman will bear in her lifetime) for Victoria, which includes Melbourne, fell from 1.82 in 1983 to 1.79 in 1984.

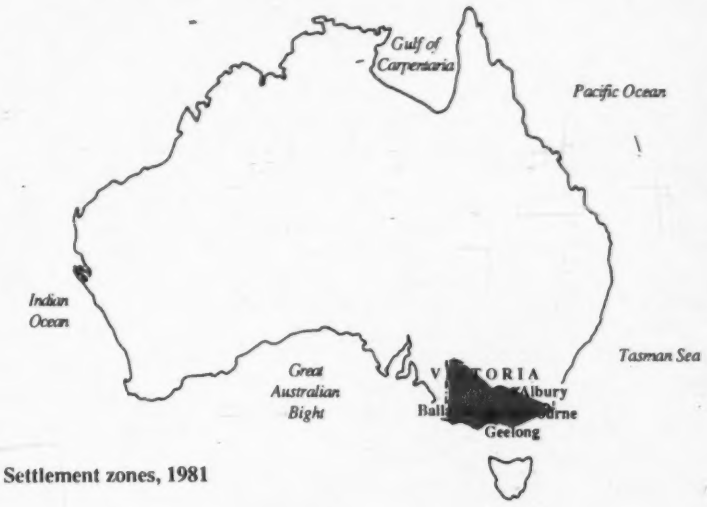
Although age-specific birthrates have generally declined since the 1950s, the birthrate for women aged 30 to 34 has increased since the mid-1970s. By 1984, the birthrate for women aged 30 to 34 (8.7 births per 1,000) was higher than for women aged 20 to 24 (8.2 per 1,000). The highest birthrates (between 20 and 24 live births per 1,000 population) are found in the outer-suburban areas of Melbourne while the lowest birthrates are found in the older, established suburbs in the Inner Urban region and Inner East region (around 9 live births per 1,000 population). Victoria's birthrate in 1982 was 15.0 compared with 15.8 for all of Australia.

AGE STRUCTURE

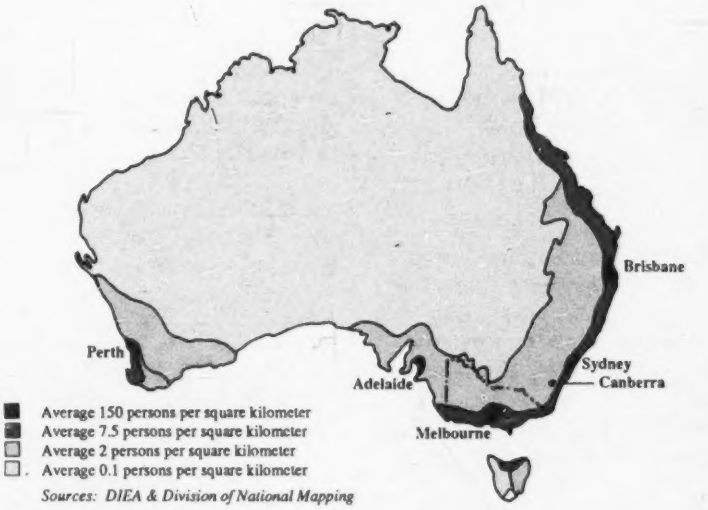
Melbourne's age structure reflects the different contributions of fertility and overseas migration. Compared with most advanced cities in the West, there is a greater percentage of population in younger age brackets. In 1981, 41 percent of Melbourne's population was under age 24; twenty-six percent was under age 14. However, there is, in line with trends in similar world cities, an increasingly aging population, in part because of the aging of large numbers of immigrants who came in the 1950s, and in part because of the decline in fertility since the 1970s. In 1981, 9 percent of Melbourne's population was over age 65. By the year 2001, 11.4 percent of the Melbourne population will be over age 65, while the share of those under age 14 should fall to 23 percent.

Younger age groups are disproportionately represented in the postwar suburban regions and those over age 65 in the more established Southern, Inner Urban, and Inner East regions. These regions, however, disguise some significant departures from this pattern. Some

Australia and the Province of Victoria

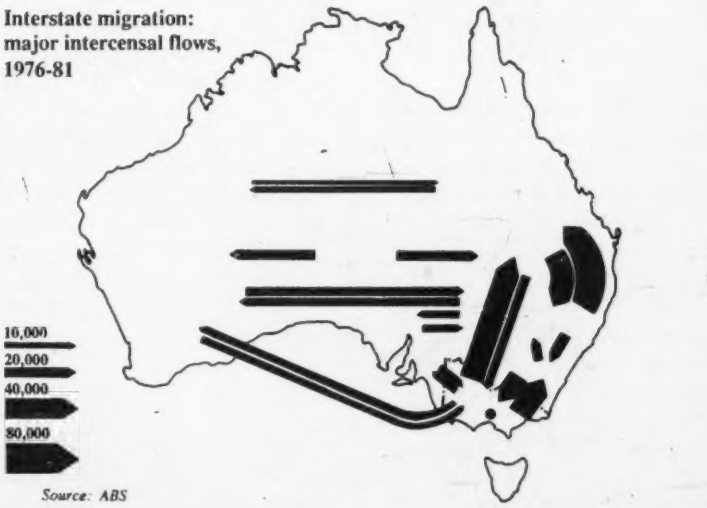


Settlement zones, 1981



Sources: DIEA & Division of National Mapping

Interstate migration: major intercensal flows, 1976-81



Source: ABS

TIPS ON TRADE

China survey

Survey Research Group (SRG), a New-York based international market research company, will conduct its second Omnibus survey in China this April and May. This survey, which will interview a representative sample of 1000 adults residing in the Shanghai area, follows the completion of SRG's first China Omnibus conducted in Beijing and Ghangzhou in 1985.

SRG's first Omnibus survey in China includes data on media exposure as well as brand awareness, ownership, and purchase intention for such products as motorcycles, electric fans, rice cookers, refrigerators, sewing machines, cameras, radios, and televisions.

Data was collected by Survey Research Hongkong through interviews with 1000 adults aged 15 and over in Guangzhou and 1000 adults in Beijing. Over a dozen central location tests, group discussions, and door-to-door surveys were conducted.

For further information on either of the SRG China Omnibus surveys, contact Jerry Stafford at NFO/SRG International, Ltd., 56 Lafayette Avenue, North White Plains, NY 10603; telephone (914) 948-5100.

beach-side municipalities in the outer-suburban Westernport region have high concentrations of the elderly, having been attracted largely to seaside retirement living.

HOUSEHOLDS

Over the past decade, single-person households in Melbourne have grown faster than any other household type, accounting for nearly 24 percent of all households in 1981. The number of lone-parent households also has grown quickly, to 6 percent of all households in 1981. On the other hand, the stereotypical nuclear household of married couple and children has grown slowly, and by 1981 represented only 37 percent of all households.

Single-person households tend to be at both ends of the age spectrum, with many elderly single-person households resulting from the death of partners, but with a substantial number of young, never-married, single-person households as well.

Lone-parenthood may be an increasingly fleeting experience for Melbourne's divorced; remarriage in Victoria is on the rise. In 1984, remarriages accounted for 31 percent of all marriages, up from 15 percent in 1974.

The growing diversity of Melbourne's household structure presents a challenge to current housing and planning policy. There is a need for more medium-density housing such as townhouses and apartments. The other significant aspect with regard to Melbourne's households is that the two most rapidly growing household types--lone parents and singles--usually have lower incomes, suggesting a polarization of incomes between established family types and newly formed households.

The Inner Urban region has the highest number of nontraditional households with only 17 percent of its households containing two parents and children. Two of the outlying regions--Outer East and Western--have the greatest proportion of married couples, 46 percent and 41 percent, respectively.

HOUSING

In 1976, a visiting British housing authority remarked, "Australians are among the best-housed people in the world, and they are also perhaps the most equally housed." Melbourne's housing testifies to this statement.

In metropolitan Melbourne, 71 percent of all households are owner-occupied and, with the exception of the Inner Urban region where only 37 percent of dwellings are owner-occupied, there are few regional differences in the proportion of ownership. The median-sized dwelling in Melbourne in 1981 had 5.2 rooms; again with the exception of the Inner Urban region, little difference is found among the regions. The most affluent region is the Inner East with 5.5 rooms per dwelling. Thus, with an average occupancy of 0.6 people per room, overcrowding is virtually unknown. Nearly all dwellings have running water, internal flush toilets, and electricity.

The homogeneity of dwelling types in Melbourne offers little choice to Melbourne homeowners. Over three-quarters of all dwellings are detached, with another quarter a mixture of terraced housing and low-rise and high-rise apartments.

Nearly all the high-rise flats are located in the Inner Urban region, the bulk being publicly owned, although recent years have seen a spate of high-rise luxury apartments within close proximity to the central business district.

The majority of terraced houses and low-rise flats are also in the Inner Urban area with some spillover to neighboring municipalities in the Inner East, Southern, and North West regions. The homogeneity of housing is most pronounced in the Outer East region where 92 percent of dwellings are detached houses, although six of the eight regions have detached dwellings as more than 80 percent of their stock.

Private rental units, contrary to the experience of many countries,

COMPARATIVELY SPEAKING

An average square kilometer in Melbourne houses 150 people; in Tokyo, 5436.

COMPARATIVELY SPEAKING

have remained remarkably resilient over recent decades, accounting for about 20 percent of all occupied housing. Regional variations, however, abound. In the Inner Urban region, 44 percent of the dwellings are privately rented; in the Southern region, 22 percent; and in the Outer East region, only 11.5 percent. The absence of rent control and capital gains tax on the sale of property, combined with landlord-tenant legislation that until recently favored landlords, has made private rentals attractive for landlords.

In 1981, public housing accounted for only 2.6 percent of all dwellings due largely to government policy between the 1950s and the 1970s which led to the sale of more than half of all public-housing stock. A disproportionate share (nearly 41 percent) of public housing is concentrated in the Inner Urban area.

Unlike the United Kingdom where public-housing tenants are encouraged to purchase, the Victorian government has largely ceased the sale of public housing and embarked on a program to significantly expand the public-housing sector. This policy recognizes the difficulties that the sale of public housing and consequent stock reduction created for the growing number of lower-income households, among which lone-parent families figure prominently. New public housing in Victoria rivals or betters that of the private sector.

House prices have risen in the last decade with the median-priced house in Melbourne in 1983 worth about $US 66,600, just over four times the yearly earnings of the average Melbourne resident.

Regional variations in dwelling-price increases have been far from uniform with housing prices rising fastest in the Inner Urban, Inner East, and Southern regions. Housing prices in Fitzroy, an Inner Urban suburb, for example, soared 17 percent annually between 1971 and 1983, while in Footscray, a suburb in the Western region, prices only climbed 9 percent annually.

Rising prices have tightened the housing market for middle-income families. In 1971, a household of one breadwinner with average earnings could afford the mean-priced house in 46 of the 56 municipalities in Melbourne. By 1983, that same household could afford the mean-priced house in only five municipalities. Whether this means that Melbourne will become more income and class segregated remains to be seen.

TIPS ON TRENDS

Sterilization on the rise in Britain

Three-quarters of all British women aged 18 to 44 used some form of contraception in 1983, according to Britain's recently published 1983 Report of the General Household Survey (GHS), which included for the first time data on contraception. Oral contraceptives were preferred by 28 percent of women in this age group and by more than half of women aged 20 to 24. Use of oral contraception declines with age however, the report states: only 4 percent of 40-to-44-year-olds took the pill in 1983.

Comparing current GHS results to earlier surveys shows sterilization for birth control increasing steadily since 1970. Overall, 22 percent of women aged 18 to 44 had been sterilized or were living with a sterilized partner in 1983, although virtually none under 25 opted for this method.

From 1970 to 1983, the percentage of married or formerly married women from 16 to 39 who were sterilized or had a sterilized partner rose sharply from 4 percent to 24 percent. The period from 1976 to 1983 saw increased sterilization limited to the 30-to-44 age group. Men were as likely as women to be sterilized when only one partner was so classified.

The survey also shows that in 1983, 35 percent of women cohabitated before marriage. Further, if today's rising divorce rate is maintained, one in four couples will divorce before their fifteenth anniversary. The increasing divorce rate also was reported by another annual government survey, Social Trends (ST), issued in early 1986. According to ST, 130,000 women and 49,000 men filed for divorce in 1984.

Another GHS finding shows decreased family size. In 1982, family size was 2.64 per household compared with 2.91 per household in 1971. Over the same period, persons living alone rose sharply from 6 percent to 23 percent of the total population. One-parent families also were up, from 5 percent to 13 percent of the total.

--Peter Inserra

EDUCATION

Education is largely the responsibility of state governments in Australia. Formal education is divided into four sectors: schools (primary and secondary levels), technical and further education (TAFE), colleges of advanced education (CAEs), and universities.

At the primary and secondary levels, there are a number of private schools, run either by the Catholic Church or other nongovernment groups. In 1982, there were 493 Roman Catholic schools in the State of Victoria.

About three-quarters of primary school students attend public schools, while the remainder attend private (mainly Catholic) schools. In 1982, almost a half million children attended Victoria's primary schools. At the secondary level, where schooling is compulsory only until age 15, the proportion attending private school increases to nearly a third of all students. High schoolers in the State of Victoria totaled 341,410 in 1982.

Demographic projections prepared by the Australian Bureau of Statistics show primary school enrollments in Melbourne declining until the late 1980s and then beginning to increase again. Secondary school enrollments are more difficult to project because they are dependent, among other factors, on students' perceptions of employment opportunities. High school graduates are fewer in

FEATURE

APASCO provides special marketing services "Down Under"

Most firms in the United States take advantage of the detailed manipulation of census and zip code data by private firms. Firms listed in the annual American Demographics Directory of Data Companies provide data for almost any configuration of geography, and many have demographers on staff who update numbers during the census interval.

Australia has at least one company that provides full service data manipulation and mapping similar to that available in the United States.

APASCO, with offices in North Sydney and Melbourne, provides demographic and mapping information in four ways.

--You can buy a computer terminal and obtain direct access to their systems 24 hours a day (probably the least likely solution for a firm based in the United States).

--You can buy a ready-made product or a special tabulation "over the counter" through a letter, a meeting with the company, or by telephone.

--You can buy consulting services that will include analytical and interpretive services as well as reports. This may be a useful route for firms not familiar with cultural differences in Australia.

--Or you can send someone to work at the APASCO computing center and receive consultation from their staff at the same time.

Typical uses of APASCO's databases are for selecting and setting up sales or distribution territories in Australia. Databases are used to target more effectively for media buying, advertising, and direct marketing. They are used to improve sales management performance and market planning and forecasting--exactly the same kinds of applications for which U. S. firms use U. S. data companies.

To target markets for direct mail, for example, APASCO can rank all postcodes (equivalent of our zip codes) in a region in descending order of incidence in the market you are trying to reach. If, for example, you are trying to target households with high school students, APASCO would tell you which postcodes in which regions contain the most prospects. If you wanted it, APASCO could then provide you with a color map of those postcodes, a helpful tool when trying to make people in your organization understand the strategy you are considering. Maps of Australian postcodes for each region are also available from APASCO without any additional data.

Just as U. S. companies have created products that provide total market estimates and indexes of buying power for specific consumer goods and services, so has APASCO.

We found APASCO's *Product and Service Manual* and their product brochures clearly illustrated and written--no language barriers were apparent, either from industry jargon or simply a different brand of English. Descriptions of products are clear, and examples of report formats and applications are given in each case.

For more information about APASCO's products and services, contact Mitchell Burman or Tony Buxton at APASCO, 5th Floor, 56 Berry Street, North Sydney, NSW 2060, Australia; telephone (02) 922-2088.

Australia than in other modernized countries, with girls more likely to complete high school than boys. In 1982, 39.5 percent of young women finished high school, while only 29.4 percent of young men did so.

Higher education is the fastest-growing type of education in Melbourne, but not because of interest from new high school graduates. Melbourne hosts 14 colleges of advanced education, three universities, and 19 TAFE colleges. Two more TAFEs will open soon in the city. There are no fees for tertiary education in Australia, and a universal means-tested student allowance is provided.

Even so, higher education is not as popular with new high school graduates as in other countries. In 1982, only 46 percent of new high school graduates went to college, compared with 56 percent in 1976. Reflecting in part this decline, the demographic profile of students in higher education is changing, with a declining proportion of full-time students and an increasing proportion of more mature (aged 21 to 64), part-time students. Thus, overall, the proportion of the Melbourne population with any form of post-secondary school qualifications is increasing: in 1969, only 18 percent of Melbourne's adult population had post-secondary qualifications, while in 1982, this figure had jumped to 41 percent.

University and CAE qualifications correlate highly in Melbourne with socioeconomic status, and the share of population with such qualifications varies from a high of 15 percent in the affluent Inner East region to less than 5 percent in the Western and North West regions of the city. There is little variation, however, in the proportion of foreign-born and Australian-born participation in higher education with all participating at about the same level--27 percent. This is another reason why Melbourne is seen as a city of opportunity for many overseas-born migrants.

TRANSPORT

Melbourne's suburban sprawl promotes a dependence on private cars even though public transit is good compared with many North American cities of similar size. The Ministry of Transport's 1978-79 survey of metropolitan travel behavior found that nearly two-thirds of all trips in Melbourne were by private car, while 13 percent were by public transport. Inner-region residents traveled slightly more often

by public transport.

The spread of industry to the outer suburbs marked a change from the period prior to the mid-1950s when most workplaces, blue- or white-collar, were accessible by public transport. For an increasing proportion of the noncentral business-district work force, public transport was not a feasible alternative to the car, given the failure to extend the tram and train network in the postwar period of suburban development. Since the war, the most significant additions have been new freeways.

COMPARATIVELY SPEAKING

The average Australian drinks over twice as much wine and about a third more beer than the average American.

COMPARATIVELY SPEAKING

RETAILING AND RESTAURANTS

Melbourne has an impressive array of retailers. In 1980, more than 28,000 retail establishments, along with some 4,200 cafes, restaurants, and hotels dotted the city. Melbourne's retail industry combines elements of both North American and European traditions. The last two decades have seen the introduction of about a dozen free-standing regional shopping centers of the type found in suburban North America. These have emerged simultaneously with a resurgence of growth of suburban strip-shopping centers and new investment in central business retail areas.

To survive, the strip-shopping centers have modernized and diversified to include more food establishments and clothing boutiques. This diversity has been encouraged by the multicultural nature of Melbourne--many stores cater to particular ethnic groups--and shop trading hours which effectively prevent large chains and multinationals from driving out the small family business. Most retail premises can open only between 9 a.m. and 5:30 p.m. on weekdays (extended to 9 p.m. on Fridays) and until 12:30 p.m. on Saturdays. Retail trading on Saturday afternoons and evenings and on Sundays is prohibited.

Restaurant dining is an important part of the lifestyle of Melbournians, a fact reflected in the huge number of restaurants. Again, elements of the European and North American traditions combine, but are overlaid with some uniquely Melbourne characteristics. There are large numbers of the North American type fast-food restaurants, but they are outnumbered by typical European-type bistros, supplemented by substantial numbers of Chinese, Indochinese, Malaysian, and Indian cafes. Despite the great diversity, most restaurants share a Melbournian characteristic--the right of customers to bring their own alcohol to a restaurant and drink it on the premises. The number of BYO (Bring Your Own) restaurants exceed those licensed to sell alcohol.

The preference of many Melbourne residents for recreation outside the home explains the large number of cinemas in Melbourne, despite VCR ownership by 40 percent of households. In the early 1980s, there were more than 120 cinemas in Melbourne, and a number of new ones are being built.

LABOR FORCE

Melbourne, like most large cities, has restructured industrially in the last decade. Manufacturing industry, which accounted for more than 30 percent of employment in the 1960s, has declined rapidly and now accounts for about 24 percent of employment. Conversely, service industries (finance and insurance, public administration, sales and community services) continue to expand. In 1981, the service sector accounted for about 30 percent of employment.

Compared to other Australian cities, Melbourne's industrial base has historically centered around and been dependent on manufacturing. Motor vehicle manufacture and clothing and footware were two of Melbourne's largest industries: both were severely affected by the world recession following the 1973 energy crisis. As a result, the increase in unemployment in Melbourne was greater than in most other cities in Australia, peaking at just under 10 percent in the early 1980s.

Melbourne has staged a minor industrial renaissance, however, with growth in several industrial sectors. By 1985, Melbourne's unemployment rate was the lowest of any capital city in Australia, about 6 percent. Particularly important to this growth has been the building and constuction industry where expansion in residential construction has been paralleled with a number of large-scale commercial developments.

SOURCES

The Australian Bureau of Statistics has an office in each capital city. In addition to a census every five years, Victoria collects important social, demographic, and economic information throughout the year and compiles statistical summaries in printed format. They are also available on computer printout, magnetic tape, and microfiche.

The Melbourne office has a reference library open to the public as well as an Information Services Section (telephone 03 63 0181), which handles inquiries. Further information on statistical information for Melbourne is available from the Melbourne office of the Australian Bureau of Statistics by writing to: Deputy Commonwealth Statistician, Attn. Information Services, G.P.O. Box 2796Y, Melbourne 3001, Australia.

The most important sources used in this profile were *Melbourne...a Social Atlas*, produced by the Division of National Mapping and

continued on p. 12

REGIONS

SOUTH AMERICA

Brazil

Considering Brazil's per capita income, school attendance is low. In 1980, fewer than a third of 12-to-15-year-olds attended secondary school, compared with more than half in Malaysia and more than five-sixths in Korea, both countries with lower per capita incomes than Brazil's.

Brazil's wider income gap between rich and poor may be the cause. Thirty percent of Brazilian households account for only 4 to 6 percent of total income; the top ten percent of households, 41 to 50 percent.

Most Brazilian children begin school but drop out after two or three years. In the urban south--Brazil's wealthiest region--the average child will have attended school for only 4.5 years by the time he or she is a teenager and in the poor northeast region, a mere 0.7 years.

In the poorest area, only a third of the children from the area's poorest families attended school in 1980 while nine-tenths of the richest children in this region did. However, poor children in rich areas fared much better, staying in school longer than the poor in poor areas. Up to two-thirds of poor children in the wealthy south, for example, were enrolled in school. Schools in richer areas with better facilities and teachers appear to encourage children to remain in school.

These findings from a recent World Bank study suggest that Brazil may gain more productivity by improving the quality of a small number of schools so that students who start school will stay longer rather than expanding the number of its schools.

AFRICA

Kenya

Kenya's population rate of 4 percent a year is the highest in the world. At this rate of increase, Kenya's population of 17 million will double in the next 17 years.

Population growth rates in Kenya's urban centers are even higher. The Kenyan capital, Nairobi, is increasing at the rate of 8 percent a year. By the year 2000, its current population of 1.2 million people will swell to 3 million.

In 1980, Kenya's urban population accounted for only 15 percent of the total. By the year 2000, 30 percent of the total population will be urbanized.

To offset Kenya's rapid population growth, the government is urging couples to have no more than four children. Civil service workers with more than four children are no longer eligible for maternity leaves. Likewise, special fees are being levied on families of civil service workers for any extra children attending public school.

Kenya's National Council for Population Development, which had traditionally concentrated on reaching women through maternal and child health services, is taking a new approach--over-the-counter family planning services. This attempt to increase family planning acceptance uses male shopkeepers-- who already serve the community by distributing drugs--to dispense contraceptives. The sale of contraceptives in village shops gives men immediate access to family planning alternatives, an important factor in controlling population in Kenya, where men usually have the say in matters of sex and family size.

MIDDLE EAST

Turkey

For the first time, more Turks live in urban areas than in rural areas, according to preliminary results of the Turkish census held in October 1985. Turkey's urban population has increased eightfold in less than 60 years. Nearly 54 percent of Turkey's 51.4 million people now crowd Turkey's urban areas.

Rapid urbanization also is reflected in the increase in number of cities with more than one million inhabitants from 3 to 11 since 1980. Istanbul's population of 5.5 million people is nearly double of what it was only five years ago.

Preliminary census results came as a surprise to Turkey's State Institute of Statistics, who had underestimated the size of Turkey's

total population and its growth rate. Turkey's total population now stands at about 51.4 million with a growth rate of 2.78 percent. This represents a fourfold increase in population in less than 60 years if the 2.5 million Turks living abroad are figured in with census results.

This unexpectedly high growth rate hovers very close to the peak level in the 1955 to 1960 period of 2.85 percent.

NORTH AMERICA

Canada

Canada's current population of 25 million will increase slowly to 30 million by 2026 and then start to decline, according to Canadian population projections just released by Statistics Canada. This projection is based on a continued total fertility rate of 1.7 lifetime births per woman and net immigration of 50,000 per year.

Another scenario projects Canada's population topping out at 28 million by 2016 due to the total fertility rate falling to 1.4. The possibility of the total fertility rate rising is considered a longshot unless Canadian attitudes toward family size change radically.

These projections, as do all projections, make assumptions about future immigration and life expectancy. Statistics Canada sees life expectancy rising faster for males than females. By 1996, male life expectancy should reach 75; female life expectancy, 82. Immigration should level off at near the 100,000 figure due to family reunification trends and world refugee problems, while 50,000 Canadians are expected to emigrate.

ASIA

China

China's policy and system reforms have boosted per capita national income 6.8 percent a year from 1979 to 1984, despite relatively rapid population growth. In contrast, from 1952 to 1982, per capita national income growth averaged 4 percent annually.

Per capita national income in developed countries is about ten times that of China's. To catch up by the year 2050, China's per capita income rate will have to remain as high as 5.5 or 6.5 percent while developed countries can coast along at a 2 or 3 percent annual increase.

Maintaining such a fast pace of economic growth is no easy task. From 1960 to 1982 only two developing countries--South Korea (6.6 percent) and Greece (5.2 percent)--sustained such rapid progress (excluding oil-rich and small countries).

Canada's census families by Province: 1981 to 1985 *(in thousands)*

	1981 (census)	*1982 (estimate)*	*1983 (estimate)*	*1984 (estimate)*	*1985 (estimate)*
Canada[1]	6,309.2	6,424.8	6,528.1	6,629.9	6,727.5
Newfoundland	135.1	136.8	139.8	141.9	143.8
Prince Edward Island	30.2	30.6	31.1	31.6	32.2
Nova Scotia	216.2	218.9	222.1	226.2	229.7
New Brunswick	176.6	178.5	181.7	184.7	187.5
Quebec	1,671.4	1,692.6	1,710.7	1,729.7	1,748.5
Ontario	2,278.8	2,316.4	2,355.8	2,400.9	2,445.6
Manitoba	262.2	265.7	270.1	274.0	278.0
Saskatchewan	245.7	249.7	254.1	259.2	262.8
Alberta	565.5	593.1	609.3	614.6	623.5
British Columbia	727.6	742.4	753.4	767.2	775.9

[1] *Not including Yukon and Northwest Territories.*
Note: Each figure refers to June 1 of each year and has been rounded independently to the nearest hundred.

CONFERENCES

Demographics

Seventy-six separate seminars on a wide range of topics of interest to international marketers will be presented by the Population Association of America at its 1986 annual meeting in San Francisco, April 3-5.

Seminar topics include, among many others, temporary international migration, infant mortality in developed societies, population trends in China, declining population in the Western world, women's status and fertility in developing countries, and consequences of demographic change.

For registration materials and a full list of conference seminars, contact the Population Association of America, P.O. Box 14182, Benjamin Franklin Station, Washington, DC 20044; telephone (202) 393-3253.

COMING UP

Tokyo: Japan's populous and complex entrepreneurial powerhouse

Market research in Europe: A country-by-country cost comparison

INSIDE

INFORMATION

Asian marketers, take note

Finally, a monthly advertising magazine from Asia with promise. *Asian Advertising and Marketing* magazine made its debut with its January 1986 issue. Published in Hong Kong by Canadian Roy Howard, this new entry claims "to cover all that's important in advertising and marketing in Asia and beyond."

A tall order for sure, but this new publication makes an initial good go of it. Well-written and beautifully illustrated articles with titles like, "Multinationals think small in Asia's new rural markets," "China embraces the soft sell," and "Pitfalls and problems of advertising in Malaysia" support AA&M's promise to "put the world's fastest growing markets in perspective for the people that are making them grow."

Multinationals think small in Asia's new rural markets

A two-page spread from a recent issue of Asian Advertising & Marketing

Other ambitions include publishing news and features from correspondents in every Asian capital (including Beijing) backed up by the latest local, regional, and international research data; analyses of consumer trends and lifestyles; market-by-market reports on such issues as youth and women; interviews with top agency, public relations, and service industry people, and of course with advertisers; creative portfolios of the best TV and print work around the region, and of visible campaigns that are working or not.

AA&M is distributed free to 10,000 advertising and marketing executives throughout the Asian region. Twenty-five percent of these freebies go to marketers in Hong Kong, 15 percent to marketers in Japan, 12 percent to those in Singapore, and 11 percent to those in Thailand. The rest are mailed to Malaysian, Taiwanese, South Korean, Chinese, Fillipino, Indian, Sri Lankan, Pakistani, and Nepalese advertising and marketing executives.

AA&M also is available to subscribers in North America, Europe, Australia, and New Zealand. Annual airmail subscription rates are US $40 for 12 issues, $55 for 24 issues.

For more information, contact United States-based AA&M advertising representatives. The West Coast representative is Scott, Marshall, Sands & McGinley, Inc., 3700 Wilshire Boulevard, Suite 500, Los Angeles, CA 90010; telephone (213) 382-6346. The East Coast representative is McAvoy Advertising & Mktg, Inc., 12 Hickory Hill Lane, P.O. Box 66, Tappan, New York, NY 10983; telephone (914) 365-0858

For subscription information, contact: *Asian Advertising & Marketing*, Attn: Circulation Department, 1801 World Trade Centre, Hong Kong. •

continued from p. 9

the Australian Bureau of Statistics, and *Social Indicators, Victoria*, No. 1, Australian Bureau of Statistics, Melbourne, Australia. (ABS Catalog No. 4101.2). A useful source for overseas readers will be the *1986 Catalog of Publications Australia* (Catalog number 1101.0), available by writing to: Australian Bureau of Statistics, P.O. Box 10, Belconnen 2616 A.C.T., Australia.

Housing information is collected in *Melbourne Housing Indicators*, available from Swinburne Institute Centre for Urban Studies, P. O. Box 218, Hawthorn, Victoria 3122, Australia. •

--Maryann Wulff, Terry Burke, and Peter Newton

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